



# Portfolio Governance Committee

## Customer-centric design and planning

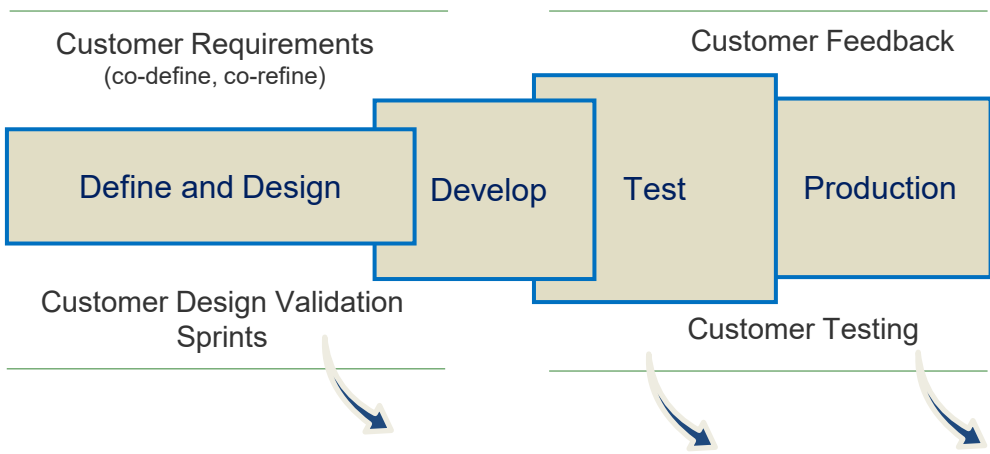
24 May 2018

# Purpose and Outcome

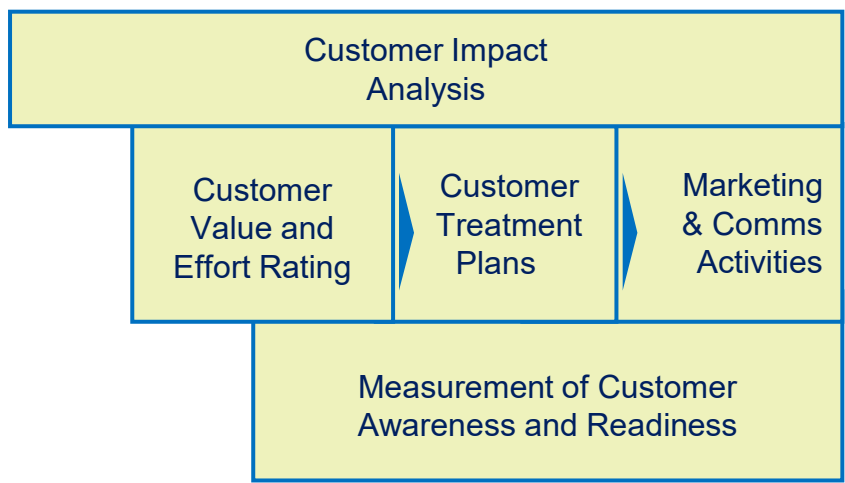
- *The Committee would like to understand the approach the Programme is taking to engage customers and understand how they can influence planning and design. The Programme has been asked to develop practical, worked-through examples that show the work they are doing in this space and bring this back to the Committee.*
- *This paper shows the frameworks being used to drive customer-centric design of our digital channels and the outside-in approach to managing customer awareness and readiness. Several examples are given of how customer-centric approaches are being used to drive design and planning.*
- *The intent is to inform the PGC of current practices and their application and provide a high level view of opportunities for improvements to design practices in R4.*

# Frameworks used for design and planning

## 1 Customer-centric design



## 2 Customer awareness and readiness



# Examples of application in design and planning

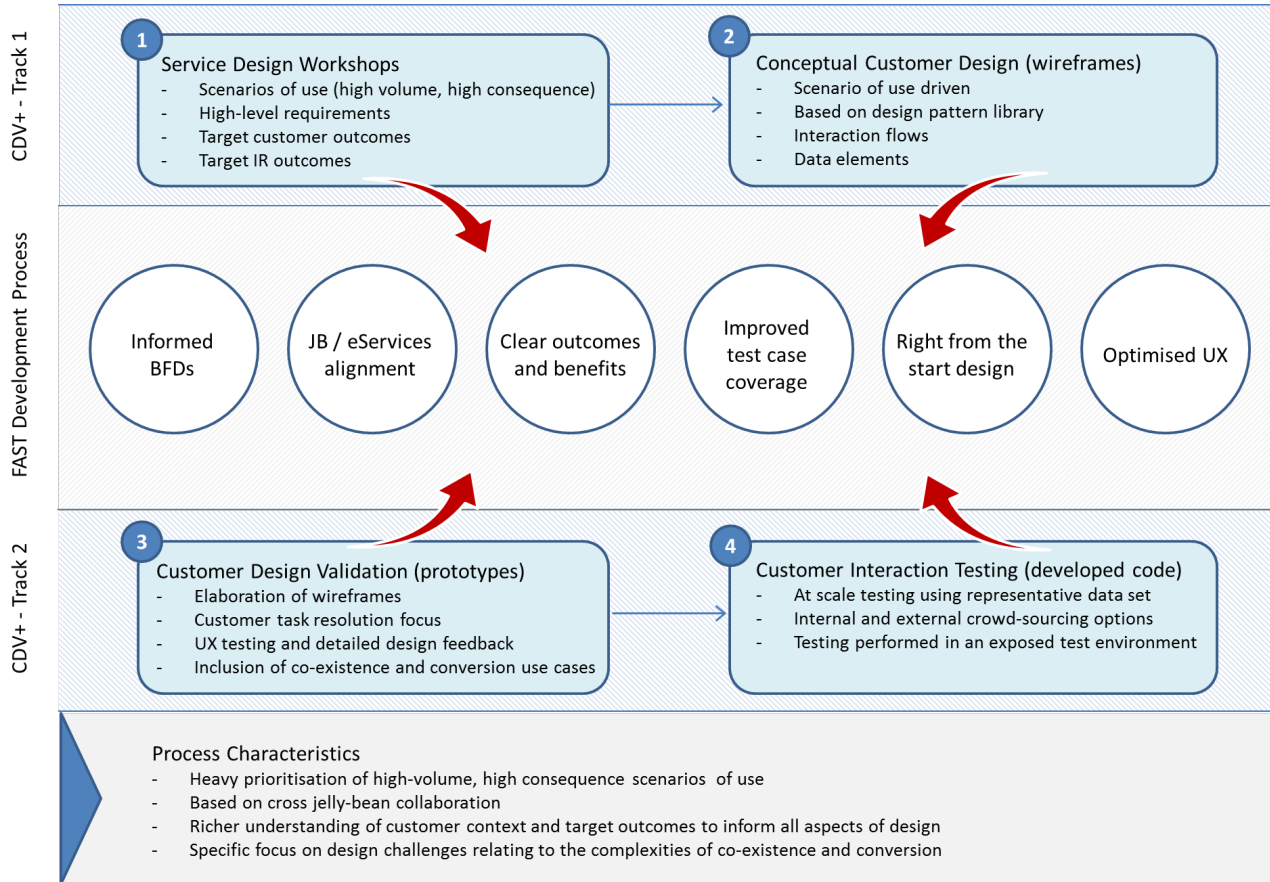
## *Design examples*

- **Tax agent operating model:** in depth analysis of a representative cross-section of tax agents to understand their different operating models and their patterns of use of IR's and other systems within their businesses.
- **Tax technical user analysis:** in depth analysis of a representative group of tax technical customers on their utilisation patterns for ird.govt as their general patterns for searching and using tax technical information in their roles.
- **ird.govt beta design:** User interviews identified core tasks for childcare customers when using ird.govt. A co-design approach was used to develop optimised online content, navigation and interaction models for the core tasks. (video clip available)
- **myIR prototyping for Working for Families:** High-impact customer use cases were identified early in the design process and marked for prototyping and customer design validation. Prototype interfaces were developed using eServices design patterns and validated with customers before being fed into the FAST development process (video clip available)
- **Employer Information customer testing:** Testing of changes made to user interface in myIR in order to assess ability to resolve critical tasks such as entering, uploading and updating employer information. (video clip available)

## *Planning examples*

- **Customer impact assessment:** Customer testing of myIR exposed weaknesses in design associated with management of employer information. Materiality assessments of customer impact across different customer sub-segments informed the re-design and the creation of new treatment plans for impacted customers.
- **Outside-in measurement of customer awareness:** measurements of customer awareness and sentiment regarding some R2 changes led to re-direction of account management and ComCom engagement activities.

# Continuous improvement of eServices design



## *Modifying the R4 design process*

- **Sequencing of design activities:** Currently the design of the customer interaction in IR digital channels occurs after core process design. With this sequencing interaction models and user experience in the channels are often constrained by limitations imposed by core process design which is already locked down and in some cases partially through the development cycle.
- **Integrated channel and process design:** Processes are designed with insufficient focus on how they will be supported by the customer facing channels. Ideally the processes should be designed concurrently with the channels' customer interaction models in order to ensure that the processes are simple and efficient from a customer perspective.
- **Using the families segment strategy to guide design:** The families segment strategy provides rich context for design and highlights opportunities and pain points that could be addressed through the design process. Ensuring that customer outcomes described in the strategy are used to inform the design process will increase the customer value of the delivered solutions.
- **Thinking of test from the start:** Focusing on testing during design helps strengthen solution design. It prompts the design team to think through a richer set of scenarios of use and make conscious decisions about what is acceptable and unacceptable for customers. This also informs the test approach and allows the testing team to optimise the production of test cases.

## *Continuous improvement*

- Customer-centric practices are already prevalent and embedded across many areas of the programme. Some areas such as the design of eServices have mature, repeatable processes which help mitigate risk and ensure positive customer outcomes.
- The practices will continue to evolve as they become more standardised and efficient based on lessons learned.
- Work will continue on extending the application of these practices in areas where they can add value.